

# CCTO Micro-Training

## Entering A Contact



Fields with \* are required to create your contact.  
Fields with + are required by the state to track data.

Click **Contacts** at the left of the screen and then select **+New** at the top.

Record Information

Contact or Case Patient	*	Contact
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### #1: Record Information

- Contact or Case Patient\* (leave all other fields in this box **BLANK** for contacts)

Basic Info

Priority Contact or Case ☐ No

First Name	*	Minnie
Middle Name		---
Last Name	*	Mouse
Preferred Name		---
Date of Birth (DOB)	+	3/12/1950

### #2: Basic Info

- First Name\*
- Last Name\*
- Date of Birth+ (not used for notification, but used in digital monitoring)

The **Priority Case or Contact** toggle allows you to flag a contact who is higher priority to receive a phone call. **Check with your supervisor and your local policies to see if you should be using this toggle.**

Source Case Information

Ongoing Exposure ☐ No

NC-COVID Event ID of Source Patient #1 (Use the number ...)	+	101454458
Last Date of Exposure to Source Patient #1	*	11/18/2020
NC-COVID Event ID of Source Patient #2 (Use the number ...)		101345323
Last Date of Exposure to Source Patient #2		11/24/2020

### #3: Source Case Information

- Ongoing Exposure (if, for example, your contact lives with a case patient)
- NC-COVID Event ID+
- Last Date of Exposure\*

If you do not have an NC-COVID Event ID, include Source Patient Name and Birthdate.

Personal Info

Employer		Hermit Crab Inc.
Job Title		Builder
Preferred language	+	English
Other Preferred Language		---

### #4: Personal Info

- Employer (if known)
- Preferred Language+


If "Other" is selected in the **Preferred Language** field, the **Other Preferred Language** field will appear.

Contact Information	
Country Code	---
Primary Phone (will be used for text messages)	1-222-444-6668
Phone #2	1-111-333-5557
Phone #3	---
Email	sandy@castle.com
Preferred Method of Contact	Phone Call

## #5: Contact Information

- Primary Phone (*no country code or dashes needed - this number will be used for automated text outreach if applicable*)
- Email
- Preferred Method of Contact<sup>+</sup>

*If you set Preferred Method of Contact to "Text Message" or "Email," a Primary Phone number or Email will become required.*

Address	
Address Line 1	1000 Hightide Way
Address Line 2	---
City	Shovel
State	* NC - North Carolina
Postal Code	27949
County	*  Nash


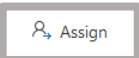
## #6: Address

- Address Line 1 (*street address*)
- City
- State\*
- Postal Code
- County\* (*use county of case if not known*)

Demographic Info	
Is Student	<input type="checkbox"/> No
Calculated Age	---
Manual Age (if DOB is not available)	---
Gender	+ Female
Race	+ Prefer not to answer
Ethnicity	+ Not Hispanic or Latino

## #7: Demographic Information

- Is Student (*if known*)
- Manual Age (*if no DOB*)
- Gender<sup>+</sup>
- Race<sup>+</sup>
- Ethnicity<sup>+</sup>

**Save your work**  to finish. If needed, you can then use **Assign**  at the top of the screen and single-click "Me" to input a "User or Team" and assign this contact to them. **You're all done!**